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POLITICS, POWER AND SOCIAL DIFFERENTIATION IN AFRICAN AGRICULTURAL VALUE CHAINS: THE EFFECTS OF COVID-19

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ABBREVIATIONS AND ACRONYMS

A1	small-scale farmers settled under Zimbabwe's Fast Track Land Reform Programme
A2	medium-scale farmers settled under Zimbabwe's Fast Track Land Reform Programme
ADMARC	Agricultural Development and Marketing Corporation (Malawi)
APRA	Agricultural Policy Research in Africa
CA	communal area peasant farmer (Zimbabwe)
CAADP	Comprehensive Africa Agriculture Development Programme
FTLRP	Fast Track Land Reform Programme 2000 (Zimbabwe)
GMB	Grain Marketing Board (Zimbabwe)
IMF	International Monetary Fund
MNC	multinational company
NASCA	National Agricultural Seeds Council Act 2019 (Nigeria)
SAPs	structural adjustment policies
SME	small- and medium-sized enterprise
VAT	Value Added Tax

EXECUTIVE SUMMARY

Since the structural adjustment policies of the 1980s, policymaking at a national and continental level has increasingly turned to agricultural commercialisation as the foundation for Africa's long-term nutrition and food security. However, socio-economic inequalities, land tenure and food insecurity, as well as livelihood and income precarities remain widespread challenges. Social differentiation within African agriculture today is the result of long-term processes of socio-economic and agrarian change, local to global power relations, agricultural and other policies, as well as shocks and stressors, including climate change, natural disasters and pandemics; and the ways that individuals act in response to these factors. The effects of shocks, such as COVID-19 have overlaid emergent and entrenched patterns of social differentiation that shape access to resources, markets, and other opportunities for those involved in commercial agriculture. Intersecting social groups have responded to long-term processes of agrarian change and shocks and stressors in different ways.

This paper draws upon the findings of the Agricultural Policy Research in Africa Programme (APRA), which began its research activities in 2016 to study the consequences of different pathways to agricultural commercialisation across value chains in six countries: Ethiopia, Ghana, Malawi, Nigeria, Tanzania, and Zimbabwe. In 2020 research teams in each of the countries conducted further research which considered the impacts of COVID-19 on these value chains, drawing upon political settlements frameworks to inform their analysis. This paper asks:

1. What can political settlements analyses tell us about agricultural value chains and responses to COVID-19 in the countries studied? and

2. How are structures and power relations throughout the value chains and actors' responses to COVID-19 related to social differentiation in the context of African agriculture?

Answering these questions involves understanding how long-term, politically influenced patterns of change have shaped social differentiation in ways that in turn affect the ability of different actors to respond to shocks. Furthermore, it involves understanding the recursive effect of those shocks on social differentiation.

Smallholder agriculture provides most of the production in all the countries and value chains studied, although the extent to which farmers participate in markets or are supported to do so varies between contexts. Each of the study countries have developed policy strategies to support smallholder and larger-scale farmers at different times, which have sometimes sought to address, but may have further entrenched social differentiation. Each of the countries studied has value chain structures, political and socio-cultural systems and practices that are context specific, albeit embedded in globalised trade systems. Rather than seeking to identify rules or universal trends, we look at different processes of change across time and space, while highlighting patterns of social differentiation that appear to be common across contexts.

The most significant marker of social difference in processes of agricultural commercialisation across the six APRA countries is the distinction between small-scale and large-scale producers. Underlying this distinction are intersecting facets of social identity, including gender and kinship status, ethnicity and migrancy/local citizenship, class/wealth status and age. To understand the social and economic consequences of commercialisation processes in practice, it is essential to consider the complexity of interactions between these facets of identity and wider processes of agrarian change. Different aspects of identity overlap, sometimes to create intersectional disadvantage. We find that each of these intersecting facets of identity underlie the nature of people's engagement in agricultural value chains, both in terms of their occupation and social and political capital in the value chain, and the degree of management and control they may have over agricultural land, and whether they are or may become smallholder or large-scale farmers. Social differentiation also affects resilience to shocks, such as COVID-19, in terms of an actor's access to social, human, and financial capital, and the strategies they employ to reduce the risk of negative outcomes and increase their resilience capacity. The ways that actors respond to shocks are not only shaped by individual agency and access to resources, but also by their pre-existing status within family and community, and in wider political and social structures.

Findings from the value chain studies discussed in this paper, show that larger farm, marketing and processing businesses had greater resilience capacities to deal with the immediate effects of COVID-19 on access to markets and labour. This is because they have been advantaged over the longer term by processes of land distribution and sometimes by support in accessing markets, to the extent that they have accumulated the capital to be able to respond to a slowdown in trade and unfavourable prices. Larger or more successful businesses with access to a reasonable amount of liquid capital, rather than only land or plant holding, could use it to stockpile goods, buy up cheap goods, pay higher transport costs and storage charges, or just withstand a period of no trading. Pre-existing patterns of social differentiation mean that those who are more able to deal with brief shocks are more likely to be men, autochthon farmers, and those who are already commercially established or wealthier. Those who have larger businesses for other reasons are also included, where these businesses may be farms operating on a greater hectarage, marketing and processing businesses turning over greater quantities of goods and covering a wide geographical area, and with many employees.

The way gender, ethnicity and migrancy as facets of identity, interact with processes of social differentiation in the face of shocks, depends on the nature of the shock and the nature of a group's resource access capability. Women, migrants, young people and the poor, as intersecting social groups who are more likely to be labourers than landowners, continue to be, overall, structurally disadvantaged by social power relations embedded within intra-household dynamics, land tenure systems and political systems that have shaped the agrarian sector over the long term. The result is that as women (both as female household heads and within female- or male-headed households) are more likely to be small-scale business owners, they have smaller capital reserves and other resilience capacities to withstand the effects of shocks like COVID-19 or turn them to their advantage. Smaller businesses are also less likely to be able to access temporary business relief packages such as loans. However, women and migrants who are successful traders or large-account farmers are less likely to suffer these effects and will have resilience capacities that are comparable to the more advantaged groups described above.

The initial COVID-19 response showed that those who have abilities and capacities for resilience were able to move position within the value chain or even move to non-agricultural activities. Actors working at the smallest scale are often pursuing multifunctional livelihoods. Whilst lacking the capital stocks and access to safety nets that can enhance their robustness to shocks, they may have skills to support a resilient response, including experiences learnt from past shocks, for example price fluctuations or new regulations that forbid or encourage imports. For many agricultural value chain actors in Africa, COVID-19 will not be the most severe shock they have experienced, while simultaneously resembling other shocks in some ways. Other shocks, for example locusts, drought, war, market collapse and land loss, have highlighted the existing unequal distribution of power and capital in a value chain, as well as the resilience of people engaged in agricultural value chains and livelihoods that are unpredictable.

In the first year of the pandemic, COVID-19 itself had the type of short-term effects that result from short-term market changes such as price fluctuations, export bans, or input provision shocks. Early data did not show that COVID-19 had caused changes that could have a longer-term impact on agrarian relations, such as distress land sales or permanent migration. However, these types of eventualities could become possible as COVID-19 becomes endemic, and unequal access to vaccines globally reinforce structural inequalities in the rate at which different countries are able to recover from the pandemic. It would then become more of a stress than a shock. For the time being, COVID-19 is more of a shock that accentuates existing longer-term patterns of social differentiation. In the medium to long term, the effects of COVID-19 are less predictable. Flows of aid are being affected as some developed countries, including the United Kingdom, that have racked up huge debts from dealing with crises at home seek to reduce their aid budgets, although simultaneously some debt repayments, for example to the International Monetary Fund (IMF), have been paused. These policies, which are also driven by political priorities, confer relative advantage on different groups and will continue to contribute to patterns and structures that shape social differentiation.

1 INTRODUCTION

Since the structural adjustment policies (SAPs) of the 1980s, policymaking at a national and continental level has increasingly turned to agricultural commercialisation as the foundation for Africa's long-term nutrition and food security. The African Union's Comprehensive Africa Agriculture Development Programme (CAADP) founded in 2003 established a pan-African approach to agricultural transformation and equitable modernisation of existing commercial agriculture (Mellor, 2014; Poulton et al., 2014). However, socio-economic inequalities, land tenure and food insecurity, as well as livelihood and income precarities remain widespread challenges. Social differentiation within African agriculture today is the result of long-term processes of socio-economic and agrarian change, local to global power relations, agricultural and other policies; as well as shocks and stressors, including climate change, natural disasters and pandemics; and the ways that individuals act in response to these factors. The effects of shocks, such as COVID-19, have overlaid emergent and entrenched patterns of social differentiation that shape access to resources, markets, and other opportunities for those involved in commercial agriculture. Intersecting social groups have responded to long-term processes of agrarian change and short-term shocks in different ways.

Agricultural policy is a politically charged arena, with international as well as local interests at play. To understand the effects of shocks such as COVID-19 on social differentiation within African commercial agriculture, it is necessary to take a political economy approach, examining shocks in the context of political and power dynamics in commercial agriculture systems. We may then analyse what these dynamics imply for the effects of COVID-19 and the responses of various actors involved in the changing commercial agriculture sector.

Since 2016, APRA has studied the consequences of different pathways to agricultural commercialisation across six countries: Ethiopia, Ghana, Malawi, Nigeria, Tanzania, and Zimbabwe. In 2020, research teams in each of the six APRA countries conducted further research, including key informant interviews, to explore the impacts of COVID-19 on value chains for seven different crops: maize, rice, sunflower, groundnuts, cocoa, palm oil and tobacco, drawing upon political settlements frameworks to inform their analysis. This paper asks:

1. What can political settlements analyses tell us about agricultural value chains and responses to COVID-19 in the countries studied? and
2. How are structures and power relations throughout the value chains and actors' responses to COVID-19 related to social differentiation in the context of African agriculture?

Answering these questions involves understanding how long-term, politically influenced patterns of change have shaped social differentiation in ways that in turn affect farmers', marketers', processors', exporters' and input providers' ability to respond to shocks. Furthermore, it involves understanding the recursive effect of those shocks on social differentiation between these value chain actors, and how they are influenced by the behaviour of other actors, notably government and development partners.

This paper will refer to agricultural 'value chains', while noting that there is room for a critical take on this term (Bair, 2005). The idea that agricultural commodities should be transferred along commercial chains, accumulating in value, is a policy position and normative approach that has grown in the last 20 years from the work of Gereffi and others (Gereffi, 2001) and has become almost ubiquitous (Ouma, 2015). The term has become commonplace in international business studies of the agricultural sector, because the notion of agriculture acting as an economic driver is attractive to governments and donors in Africa, and to larger players in the private sector, who can extract value.

An earlier term that has its roots in world-systems theory is 'commodity chains'. According to world-systems theory, social change happens in a spatio-temporal 'world', the scope of which is reproduced by the expansion and contraction of labour patterns across it (Hopkins and Wallerstein, 1977). The meaning of this term has since evolved away from its world-systems roots towards a conceptualisation of commodity chains as inter-firm networks connected to international markets (Gereffi, 1994; see also Bair, 2005). Both terms utilise the value-added concept as a basis for policy and commercial decision-making. Neither place people at the centre of the picture. Acknowledging this, we will use the value chain terminology to describe commercial agricultural systems, whilst also taking an approach to our research questions and analysis which allows us to consider power relations and the agency of individual actors: people and politics, rather than products and profits, will be the central focus of this paper examining social differentiation.

1.1 Agricultural policy in Africa

The African Union's CAADP of 2003 is a continental policy framework for the sector. The overall aims are to increase incomes and food and nutrition security through agriculture, and it focuses on achieving this through greater public investment and private sector involvement in farming (Poulton et al., 2014; Benin, 2016). There is an element of attention to social inclusivity within CAADP. Among other things, the June 2014 Malabo Declaration on Accelerated Agricultural Growth commits to increasing production and reducing losses in an inclusive way, prioritising entry of women and youth into agribusiness, and integrating agricultural development and social protection. The logic CAADP works with is that these goals can be achieved by incorporating smallholders into more intensive high technology value chains, which are often local, by encouraging large-scale private sector investment: from large-, medium- and small-scale companies, and by including farmers operating at different levels. Some commentators have seen the policy as being shaped by donor agendas (Poulton et al., 2014). The idea that intensified smallholder commercialisation can act as a primary route to poverty alleviation has also been critiqued by other authors as too much of a homogenising narrative (Poole, Chitundu and Msoni, 2013).

Hall, Scoones and Tsikata (2015) provide useful context on the political nature of agricultural policy trends, including in several of the APRA countries, in a way that contextualises the CAADP in longer-term trends of agricultural policy and investment, including SAPs. They note that many African states have historically given preferential treatment to investors, including land grants, the aim being that foreign direct investment would facilitate technology transfer and agrarian transformation. Examples of this approach include Tanzania's Development Vision 2025, Ghana's Food and Agriculture Sector Development Policy, and Ethiopia's Agriculture Development Led Industrialisation, as well as major land reform programmes throughout Africa since the 1990s that have been geared towards liberalisation and formalisation of land tenure. These policies were developed in the context of the most recent 'global land grab', of which large-scale land acquisitions by foreign and domestic investors are a part (Cotula et al., 2009; von Braun and Meinzen-Dick, 2009; Borras et al., 2011; Cotula, 2013). The trajectory of change has been towards large-scale commercial production on plantations and large estates owned by foreign companies or multinational companies (MNCs) in partnership with domestic capital. Medium-scale independent commercial farmers also play a role, often using capital amassed from outside the agricultural sector to start a farm business (Jayne, Chamberlin and Headey, 2014; Hall, Scoones and Tskikata, 2017).

While there has been growth in medium-scale commercial farms owned or managed by local elites (Jayne et al., 2016; Muyanga et al., 2019), small-scale commercial farming has continued. Smallholder agriculture provides most of the production in all the countries and value chains studied, and the extent to which farmers participate in markets or are supported to do so varies between contexts. Each of the study countries have developed policy strategies to support smallholder and large-scale farmers at different times, which have sometimes sought to address, but may have further entrenched social difference. This has tended to lead to dualist structures in the commercialisation of agriculture, rather than the inclusive growth imagined by CAADP. Poulton et al. (2014) ascribe this to the political incentives of national governments, which may not encourage them to align their agricultural policy to the advantage of smallholders, as CAADP proposes.

The narrative of 'inclusive business models' has played an important and increasing role in most of the study countries. Common forms are contract farming and outgrower schemes, where a larger company procures or processes crops produced by smaller-scale farmers and markets them in a way designed to bring mutual benefit (Glover, 1984; Little and Watts, 1994; Oya, 2013). They are often promoted as an equitable solution for local smallholder farmers in response to the new wave of large-scale land acquisitions and the evolution of business practices on already established commercial estates (Cotula and Leonard, 2010; Vermeulen and Cotula, 2010). The aim is to bring smaller farmers, marketers, processors and input suppliers into commercial agriculture in a way that makes profit for all parties, but which also achieves social goals, and avoids disadvantaging smaller actors. Risks and benefits are supposed to be shared among the central/larger and peripheral/smaller actors, and smaller actors generally are supposed to have some influence over decision-making processes and retain access to, or ownership of, resources such as land (Vermeulen and Cotula, 2010). Attention to equity, including gender equity, within the smaller enterprises is an important aspect (Daley and Park, 2012). However, there have been many critiques of their operation in practice, including land and labour relations, poor infrastructure, marginalisation of women farmers and less favourable outcomes for women, and problems of access to inputs, credit, and extension services (Tsikata, 2009; UNDP, 2010; Tsikata and Yaro, 2014; Sulle and Dancer, 2020), as well as a lack of attention to power relations and the internal practices of MNCs (Halme, Lindeman and Linna, 2012).

1.2 Policy responses to COVID-19

Policy responses to the COVID-19 pandemic have affected people and agricultural value chains around the world. Asian government export bans of important staples, including rice and wheat, increased global food insecurity, particularly for African importing countries (Sulser and Dunston, 2020). Across Africa, internal and cross-border movement of people and goods was also restricted, influencing labour, input, and export markets in the short and medium term. Governments have cushioned the blows of COVID-19 for various groups, to varying extents. An initial focus was on consumers' food security, with relief food packages disbursed to some urban areas in the immediate lockdowns in some countries, including Ghana and Zimbabwe. Some governments introduced stimulus packages for small- and medium-sized enterprises (SMEs), including agricultural processors and traders. For example, in Ethiopia, the low availability of rice prompted the government to redouble attempts to encourage rice production (Alemu and Asaye, 2021).

In APRA countries, the movement restrictions and economic policies enacted as a response to COVID-19 in the first year of the pandemic had a more widespread effect on agricultural value chain actors than the disease itself (Devereux, Béné and Hoddinott, 2020), and disproportionately affected less powerful actors. Constraints on the movement of people and goods due to lockdowns and border restrictions created the most immediate disruption for actors involved in the value chains studied. This has also created considerable resistance in some contexts:

In Malawi, the government intended to implement a national lockdown in response to the first wave of COVID-19 but was blocked by a court case which claimed the lockdown would put livelihoods of informal traders at risk (Masina, 2020). Under a new president, the second and third waves of the disease were met with social distancing restrictions, curfews and other measures such as school closures, rather than full lockdowns.

Zimbabwe implemented lockdowns in response to the first, second and third waves of the virus, including curfews, closures of public facilities such as schools, and intercity travel bans, and reductions in workforces on site. Stricter measures were implemented in harder-hit areas, and in the third wave, more lenient measures were adopted in areas where vaccination rates were highest (IMF, 2021; newsdzezimbabwe, 2021).

Ethiopia declared a state of emergency which involved banning inter-regional travel and requiring social distancing between April and September 2020. The COVID-19 Multi-Sectoral Preparedness and Response Plan included emergency food distribution to vulnerable individuals and tax breaks (IMF, 2021).

Ghana implemented social and border restrictions, including limits on the number of people allowed to gather, closure of educational facilities and restrictions on catering services. There was fuller lockdown in major urban areas, including stay-at-home orders and a ban on traffic in and out of three major cities. This was lifted after four weeks, with impacts on the poor being one reason. Wider social distancing was slowly relaxed from June 2020. Some measures were reintroduced between January and June 2021. In 2021, the government introduced new taxes and levies on basic utilities to pay back for spending (IMF, 2021).

Nigeria was particularly hard hit by COVID-19. A full lockdown was implemented from March 2020, which was gently lifted from May but reimposed in the second wave between December 2020 and January 2021. Nigeria expanded its social register in response to COVID-19, enlarging the pool of people eligible for government support (IMF, 2021).

Tanzania was an exception in that it did not implement a strict lockdown. Large gatherings were banned, but by June all restrictions had been lifted. Data on COVID-19 were no longer shared after April 2020, and President Magufuli declared the country to be COVID-19-free. After a change of president in March 2021, the government changed its approach, publishing data in July 2021 and signing up to the Covax programme, but at that time no restrictions on activities had been implemented (Mwai, 2021).

In the medium to long term, flows of aid may be altered in less predictable ways. Some developed countries, including the United Kingdom, that have racked up huge debts from dealing with the crises at home are seeking to reduce their aid budgets, although simultaneously some debt repayments, for example to the IMF, have been paused. These policies, which are also driven by political priorities, confer relative advantage on different groups and contribute to patterns and structures that shape social differentiation.

1.3 Analytical framework

In examining extant political-economic configurations, it is important to understand how powerful actors come to agreements about how to share the benefits of economic processes such as agricultural commercialisation, but also to understand how non-elite actors may act within the context of these agreements, to influence how those processes play out for them. Political settlement frameworks analyse these dynamics and the organisation and exercise of power between elites: they bring attention to 'the formal and informal processes, agreements, and practices that help consolidate politics, rather than violence, as a means for dealing with disagreements about interests, ideas and the distribution and use of power' (Laws, 2012; Laws and Leftwich, 2014, p. 1; Kelsall, 2016; Khan, 2018). These analyses pose that the political settlements reached create situations that advantage some actors to the detriment of others, and that who are the winners and losers therefore depends heavily on local contexts and political alliances between local and national elites and international capital. Simultaneously, critiques of political settlements research frameworks have pointed to the focus on elites and public sphere dynamics, arguing that this does not provide space for recognition of the agency of non-elite and the associated actor-level effects, particularly in private spheres and wider social movements (O'Rourke, 2017). O'Rourke's feminist critique shows that political settlements approaches typically do not consider gender dimensions, such as 'homosociality' in intra-elite and clientelist relationships and the effects of intra-household gender dynamics on women's access to markets and public services. However, wider literature on gender, social differentiation and agrarian change can provide the necessary insights to deepen political settlements analyses in this direction.

It is well established within literature on agrarian change in Africa that agricultural commercialisation is not a new phenomenon, but part of dynamic processes of political and social change in which smallholders and larger-scale actors have been involved for centuries. These processes of agrarian change have long underlined existing contours of social differentiation, shaped by politics (Berry, 1993; Agarwal, 1994; Razavi, 2003; Manji, 2006; Lund, 2008; Bernstein, 2010; Boone, 2014; Hall, Scoones and Tskikata, 2015). Hall, Scoones and Tsikata, amongst others, resist the narrative of investor impacts on local peoples as either 'passive beneficiaries of development' or 'victims of dispossession'. Instead, they argue that studies show more complex patterns of resistance and collaboration from local people 'in ways that advance their diverse interests and that subvert investors' plans' (Hall, Scoones and Tskikata, 2015, p. 24). They argue that the key question is 'how new forms of capital, crops, production systems, labour regimes and expertise become inserted into – or resisted by – existing political-economic configurations, and in turn how this affects agrarian structures and patterns of social differentiation, and with what distributional consequences' (Hall, Scoones and Tskikata, 2015, p. 28).

In this paper, we draw on the literature on political settlements, while bringing attention to structures, politics and institutional dynamics that produce patterns of marginalisation, exclusion, and social differentiation. In doing so, we note O'Rourke's critique of the gender blindness in political settlements literature and the need to investigate inter-elite interactions as 'homosocial' relations. We also extend it to analyse social differentiation more broadly. Here we consider the work of Berry (1993), who argues nothing is given, and trajectories of change are complex, context-specific, contingent and dynamic, affected by agency at the individual and household scale as well as macropolitical and historical processes. Therefore, we recognise that, while processes of change are situated within wider structures and mechanisms that delimit the boundaries of negotiability for different social groups (Peters, 2004; 2013), the agency of individual actors and gendered intra-household dynamics also play a key role in agrarian change (Boserup, 1970). Rather than seeking to identify rules or universal trends, we look at different processes of change across time and space, while highlighting patterns of social differentiation that appear to be common across contexts.

The most significant marker of social difference in processes of agricultural commercialisation across the six APRA countries is the distinction between small-scale and large-scale producers, with the smaller-scale operators much less able to deal with shocks. These smaller-scale actors may be farmers operating on a smaller hectarage, or marketing or processing businesses dealing with a smaller turnover of goods, or with few or no employees. Some structures have been identified which advantage larger scale actors, for example tariffs, tax breaks and administrative burdens that they are more able to bear. But who is more likely to be a small-scale farmer? We have hinted at this above and focus in this paper on facets of identity that appear most significant in the six countries studied: gender and kinship status, ethnicity and migrancy/local citizenship, and class/wealth status. Age is also a factor but did not appear to be as significant as other factors in most of the countries studied. Where this was mentioned in the country studies, it was mostly in the context of generational access to land and labour patterns. While it is useful to analyse the significance of each of these factors separately, to understand the social and political-economic drivers and consequences of commercialisation processes in practice, it is essential to consider the complexity of interactions between them. Different aspects of individual social identity overlap, sometimes to create intersectional disadvantage (Crenshaw, 1989). We find that each of these intersecting facets of identity underlie the nature of people's engagement in agricultural value chains, both in terms of their occupation and social and political capital in the value chain, and the degree of management and control they may have over agricultural land, and whether they are or may become smallholder or large-scale farmers.

Lastly, the concept of 'resilience' is useful for analysing how people and systems respond to shocks such as COVID-19 (Béné et al., 2012; Béné, 2020). Some studies use the concept to analyse resilience of the food system (Tendall et al., 2015). The concept can also refer to resilience resulting from an actor's set of capacities or abilities (Béné, 2020, pp. 809—10). This second approach characterises resilience to shocks in relation to an actor's access to social, human, and financial capital, and the strategies they employ to reduce the risk of negative outcomes and increase their resilience capacity. This may include selling assets, borrowing, or reducing household food consumption; or quickly adapting by, for example, shifting to other input suppliers and sources of labour; or pursuing alternative livelihood opportunities (Béné 2020, pp. 809—10). The ways that actors respond to shocks such as COVID-19 are not only shaped by individual agency and access to resources, but also by their pre-existing status in political and socio-economic systems.

1.4 Data collection and overview of the value chain studies

This paper draws on data collected for nine others, which cover the 11 value chains listed in Table 2.1. The authors of each country study drew on qualitative interviews with value chain actors as well as literature and media review. Table 2.1 summarises the value chains examined in each source paper, and the methods used by the authors.

1.5 Structure of the paper

The next section analyses how state control, liberalisation and political settlements in the countries studied have shaped agricultural value chains and policy responses to COVID-19. We consider firstly, the extent of liberalisation or state control and the political settlements these entail; and secondly, how governmental and non-governmental actors affect social differentiation through marketing strategies, import controls, price-fixing, collective action, and trading systems in agricultural value chains. Section 3 examines how local actors in the value chains studied have responded to COVID-19, and how their responses are shaped by access to critical resources including land, labour, credit/capital, inputs, as well as other livelihood opportunities. These in turn contribute to patterns of social differentiation.

Table 2.1: Value chains examined in the study

Country study and author/ article reference	Crop	Overview of the value chain	Methodological notes 'value chain actors' includes farmers, processors, wholesalers, retailers, and credit and other input providers etc.
Ghana (Asante, 2021)	Palm oil	Bifurcated value chain with women mainly processing and carrying out small-scale production for local markets; some larger-scale production for international markets by men.	Literature review. Twelve key informant interviews with government, donor and value chain actors. Twelve telephone interviews as part of a rapid market survey to understand impacts of COVID-19.
Ghana (Teye and Nikoi, 2021)	Cocoa	An important export crop concentrated in the southern part of the country.	Literature review. Twenty-one key informant interviews with government and value chain actors. A rapid market telephone survey on COVID-19 impacts.
Nigeria (Aiyede, 2021)	Cocoa	A less successful export crop concentrated in the southern part of the country.	Systematic review. Sixteen interviews with government, research, industry, donor and value chain actors.
Nigeria (Amaza, Mailumo and Silong, 2021)	Maize	Important food crop; modernisation of sector underway.	Literature review. Value Chain Mapping. Eighteen Interviews with eight groups of actors in Kaduna and Plateau states.
Zimbabwe (Shonhe, 2021)	Maize	An important national food crop; strongly state-controlled sector.	Documentary analysis. Twelve key informant interviews in Harare with industry and government stakeholders. Two focus group discussions with each of three types of farmer in Mvurwi, Mashonaland Central Province, 100km north-west of Harare.
Zimbabwe (Shonhe, 2021)	Tobacco	An important crop for national income; liberalised market which was affected by sanctions.	As Shonhe (2021) above.
Malawi (Chinsinga and Matita, 2021)	Groundnut	The most important legume crop in the country; fluctuating production and export levels.	Literature review. Twenty-three interviews with government, industry, development, policy and value chain actors.
Tanzania (Isinika and Jeckoniah, 2021)	Sunflower	National food crop growing in importance; unable to compete on international markets due to high price.	Literature review. Over 30 interviews with government, industry and value chain respondents.
Tanzania (Mdoe and Mlay, 2021)	Rice	Important for national consumption and export.	Literature review. Two sets of key informant interviews with the same 24 respondents from the government and rice value chain. A rapid telephone market survey contacting 16 rice value chain actors.
Ethiopia (Alemu and Assaye, 2021)	Rice	Important food crop increasing in popularity; local grown varieties cannot compete with imported basmati.	Secondary literature review. Twenty key informant interviews with government and industry actors. Four focus group discussions with value chain actors.
Nigeria (Aiyede, 2021)	Rice	Important food crop where smallholders are increasingly supported within contract farming; government controls imports to protect sector.	As Aiyede (2021) above.

Source: Authors' own

2 SHAPING VALUE CHAINS THROUGH POLITICAL SETTLEMENTS

2.1 State control, liberalisation and political settlements

Many of the effects of COVID-19 are the consequence of immediate policy responses to the disease. Yet, longer-term policy approaches of liberalisation and state control have shaped the agricultural sector in ways that result in differential impacts of short-term shocks on different actors. From the 1980s, SAPs encouraged full liberalisation of African agricultural markets. In the 21st century, the idea promoted by the African Union's CAADP and international development partners is that governments should not be entirely hands-off but shape agricultural markets in such a way that the private sector can take over almost all functions, including support to farmers. For example, the private sector is encouraged to partner with government in the provision of subsidies to farmers. Simultaneously, there is an understanding that state support and public investment is needed for private sector activity to develop, and for successful smallholder commercialisation which reduces poverty (Mellor, 2014).

According to political settlements analysis, structures of resource access and control are shaped by given institutions, reinforcing intra-elite and some elite-non-elite relations, while disadvantaging other groups (Laws, 2012). If there is a risk of conflict between groups, and especially between groups and government, a government will be inclined to enter a settlement to make things more amenable for them, for example by changing policy in their favour (Laws and Leftwich, 2014). For example, governments seeking farmers' votes may decide to implement subsidies. Settlements between elites may be to distribute rents between them (Kelsall, 2016). There may also be formal or informal arrangements, and the actors concerned are not necessarily elites.

Ideas of political settlement suggest that actors within agricultural value chains, including international actors, have the power to manipulate markets to the advantage of certain groups, practices, and modes of commercialisation. Some kind of settlement with government is necessary to make this happen. It is largely perceived that governmental manipulation of markets takes place when governments retain a large amount of control over the market, for example by fixing prices and controlling imports and exports. However, policy support is also needed for the type of liberalisation enacted in the study countries, creating a preferential climate for investment. Apart from Zimbabwe, the APRA countries have moved towards liberalisation to varying degrees, although many have retained elements of state control in many value chains. Moreover, the transition from one-party state to multi-party democracy changes political settlements, but also maintains opportunities for clientelism and patronage as drivers of policy and rents, as in Malawi (Chinsinga and Matita, 2021).

One of the most important domains in which this has happened is land. Policy determines whether land markets can be established, which is one of the key facilitating factors for large- and medium-scale agricultural investment, especially for non-autochthon farmers. Making access to land possible is an important way that governments can reach political bargains with large-scale private actors and development partners who espouse the ideology of free land markets. Examples include federal land banks for foreign direct investment in Ethiopia, investment promotion centres and special land courts in Ghana, and a series of policy programmes in Tanzania geared towards attracting large-scale investment in the rice and sugarcane sectors, including the Southern Agricultural Growth Corridor of Tanzania and Big Results Now (Hall, Scoones and Tsikata, 2015).

There are several opportunities to create political settlements with large importers and capitalists through the distribution of movable inputs, notably fertiliser. In some contexts, governments may use political discretion and cronyism to grant favourable tariffs and tax subsidies to large importers or capitalists who provide such inputs. For example, in the Ghanaian cocoa value chain, the fertiliser subsidy policy has created rents for contracts for supplying subsidised inputs, some of which have reportedly never materialised (Teye and Nikoi, 2021). Such tactics are easy to implement in the era of liberalisation, as the involvement of private sector actors in the fertiliser distribution is welcomed – although the subsidisation of such inputs is more contentious.

Governments also use subsidies to cushion producers from the more difficult aspects of operating in entirely liberalised markets, while seeking their political support. Such measures are controversial for distorting market impulses for farmers. Short-term support policies such as favourable input subsidies are frequently introduced when politically expedient. In the Nigerian cocoa value chain, they have played a role in patronage for cocoa farmers when politicians sympathetic to them are in power (Aiyede, 2021). In both the Ghanaian and Nigerian cocoa sectors, governments have created incentives such as input subsidies, training and technical assistance, access to finance and promoting access to export markets for certain farmers. In the Ghanaian palm oil sector, the government also provides technical and extension services to smallholders (Asante, 2021). In the Nigerian rice and maize sectors, federal and state governments provide loans and subsidised inputs to producers to increase production towards self-sufficiency in rice (Aiyede, 2021; Amaza, Mailumo and Silong, 2021). In Tanzania, the National Agricultural Input Voucher Scheme 2008 has coincided with election years (Mdoe and Mlay, 2021). Malawi implemented a Farm Input Subsidy Programme between 2005 and 2020 aimed at crop diversification, including groundnuts. However, the scheme was largely unsuccessful, in part due to the emotive issue of maize security at the heart of Malawi's political economy, leading to policies that have tended towards reactivity and rent seeking (World Bank, 2018; Chinsinga and Matita, 2021).

A more long-term strategy in liberalised development approaches is to support farmers through development and distribution of improved technology, which has shown varying and partial degrees of success. Technological improvement is a common discourse in donor-driven commercialisation agendas, particularly in relation to distribution of improved seeds. In Tanzania, government, development organisations and the private sector have tried to promote high quality seed to allow smallholders to perform better in export and local markets (Isinika and Jeckoniah, 2021; Mdoe and Mlay, 2021). In more highly regulated markets, marketing boards and associated structures have taken on these roles, for example in the Ghanaian cocoa value chain, where there is a long history of cultivar development alongside input support and subsidy (Teye and Nikoi, 2021). In Ethiopia, there has been heavy investment into rice research to try to tackle the shortage of home-grown long grain rice, with little success so far (Alemu and Assaye, 2021). In Malawi, donors such as USAID and Irish Aid have invested in improving farmers' access to varieties of groundnut seed that are suitable for global export markets. However, many of these seed varieties have yet to be released to farmers due to financial constraints, meaning that they continue to cultivate seed that is susceptible to disease, with limited potential for export (Chinsinga and Matita, 2021).

The presence of a crop or marketing board is connected to how liberalised or otherwise a sector is. The board generally acts as an institution through which government controls aspects such as technology development and subsidy. In Zimbabwe, the Grain Marketing Board (GMB) enjoys a pervasive monopoly over the grain industry, while the Tobacco Industry Marketing Board and Tobacco Research Board control contract farming and seed production (Shonhe, 2021). By contrast, in Ethiopia and Tanzania, there is no formal governing body for the rice sector, meaning that political power over the sector is somewhat less concentrated than in other contexts. In some places, marketing boards may remain, but retain less political control. In Ghana, the state has retained control over the cocoa sector through the Ghana Cocoa Board and its subsidiary marketing body, rejecting the push towards full liberalisation from development partners. In Malawi, SAPs precipitated the collapse of the Agricultural Development and Marketing Corporation (ADMARC), which had hitherto provided farmers with inputs, access to markets and guaranteed prices for produce. This was to the detriment of smallholders, who became reliant on often exploitative vendors and agro-dealers who operate in the more accessible parts of the country to the neglect of the remotest areas (Chinsinga and Matita, 2021).

2.2 Marketing, import controls and price-fixing

A central function of marketing boards has been controlling prices, tariffs, and taxes. In countries where governments retain control of markets, they may fix prices through marketing boards, but can also construct markets by implementing tariffs, bans and quotas. Staple crops are politically important and policies including export bans and commodity price changes have been used to solicit smallholder and consumer support during election periods. In Tanzania export bans on rice have coincided with election years since the 1960s (Mdoe and Mlay, 2021). Such policies are often temporary and designed to procure political support rather than long-term solutions to structural inequalities in the sector. Import restrictions are another way government can control markets, and they can use this to advantage different groups of producers. Larger national and international companies in Nigeria have been helped by long-term rice import restrictions and government incentives for importers to invest in domestic production (Aiyede, 2021). In Tanzania larger companies benefited when they were made eligible for tariff exemptions, which reduced consumer prices to the benefit of urban populations but did not protect smallholder farmers from cheap imports (Mdoe and Mlay, 2021).

The extent of liberalisation may vary between value chains in a given country, possibly dependent on the settlement a government reaches with external actors. In the Zimbabwe tobacco sector, the post 2009 Government of National Unity liberalised marketing in the sector, with seven out of the 36 tobacco merchants of foreign origin. Marketing power is concentrated in the hands of just five MNCs who control 80 per cent of the industry. By contrast, in the Zimbabwe maize sector the state has monopoly military control through the reintroduction of Command Agriculture in 2006 and the GMB has monopoly over the buying and selling of grain. In 2020, GMB was selling to millers at subsidised prices, though not all millers benefitted. The Grain Millers Association of Zimbabwe moderates the supply of maize to millers and has been accused of patronage and corruption. In both sectors, resettled peasant farmers (A1) and resettled large-scale capitalist farmers (A2) have secured the greatest advantage in terms of accumulation of assets and access to higher commodity prices in US dollars via informal sellers (*makoronyera*), rather than the Zimbabwean Dollars that communal area (CA) peasant farmers receive through being obliged to sell their maize through the GMB (Shonhe, 2021).

Increased export bureaucracy, such as requirements for licences, is difficult for and unpopular with traders. In the Tanzanian rice value chain, governments have exempted specific export firms from the ban, to gain favour not only with them but also with consumers as prices fall (Mdoe and Mlay, 2021). This price instability has unintended effects on other marketers, which encourages an illegal market. In the Tanzanian sunflower market, larger-scale producers have received Value Added Tax (VAT) discounts. Simultaneously, high tariffs and taxes disproportionately discourage smallholders because they cause the farm gate price to drop to a level which is unprofitable for them (Isinika and Jeckoniah, 2021). The combination of this results in clear advantage for the larger producers. In the country's rice sector, the government has also granted duty free rice import permits to large importers with political connections. Negative effects of price fixing and import controls, as well as negative donor reactions, explain why some governments have not extensively fixed imports and exports, but focused on raising production instead. For example, demand for long grain rice in Ethiopia, where farmers tend to produce short grain varieties, means banning long-grain imports is unrealistic (Alemu and Assaye, 2021).

When exercised in a short-term fashion, these types of initiatives serve only to temporarily favour groups when it is politically expedient. When they are used over the long term, they can support in a different way. In Nigeria, rice imports have been banned over the longer term, and this has helped larger national and international companies make longer-term investments in production and processing, which was too risky previously as they could not compete with the prices of imports (Aiyede, 2021). Ghana's cocoa marketing board controls the price of cocoa, keeping it below world prices but also steady, while continuing to subsidise inputs and contributing to maintaining a place for Ghanaian cocoa in world markets by trying to maintain its quality through research and extension (Teye and Nikoi, 2021). Malawi currently uses export bans to regulate exports of commodities, including maize and legumes; but the longer-term proposal is to introduce export mandates as a more proactive response to the effects of declining tobacco exports. This could have a positive impact in terms of increasing formal trade, and therefore tax revenues, as well as improve farmers' incomes; but in the context of Malawi's political settlement, there are suspicions among stakeholders as to how export mandates will be operationalised, and the potential for collusion between government officials and owners of commodity exchange platforms (Chinsinga and Matita, 2021). Reflecting on O'Rourke's (2017) critique of political settlements, it is important to observe here that homosociality across these intra-elite and clientelist relationships serves to procure political support that is also strongly gendered.

2.3 Non-governmental actors: development partners, farmers' associations, illegal and informal traders

Development partners have a strong influence on market functioning, especially historically in the SAP era and currently in the context of liberalised markets and the drives to make commercialisation work better for women and young people. Lately, public-private partnerships aimed at youth and women's empowerment and poverty reduction have been prominent aspects of policy and programming. In the Ghanaian cocoa value chain, where 80 per cent of producers are smallholders, low cocoa prices have contributed to keeping many farmers in poverty. MNCs have also used their influence within the sector to push certification standards such as Fairtrade which raise prices and provide better incomes to these farmers, as well as providing the companies with a market niche (Barrientos et al., 2008; Teye and Nikoi, 2021).

Farmers' groups have varying influences – they are cited as being weak in Tanzania (Isinika and Jeckoniah, 2021), but those in Nigeria managed to encourage the government to close the borders to maize imports to protect maize farmers (Amaza, Mailumo and Silong, 2021). Trades unions also exert power and influence over who benefits from agricultural policies. The Ghana Union of Traders' Associations has a strong membership base, and in the palm oil sector the government has avoided introducing policies that the union does not support to avoid electoral backlash (Asante, 2021). This can lead to support for smaller-scale actors when they are well represented by such organisations. At a more local level, participation in farmers' associations has been critical for smallholders in the Malawian groundnut sector, as a form of social capital, knowledge, and support, as well as leading to other tangible benefits for production (Chinsinga and Matita, 2021).

In many value chains, most local marketing does not travel through marketing boards and could be labelled 'informal'. This provides a more advantageous market route for some people, while potentially undermining states. Illegal marketing – that is, smuggling – advantages those who cannot use government policies profitably, but also powerful individuals who may be involved. In Zimbabwe, the *makoronyera* have been a powerful disruptive influence on monopoly state control and cross-border illicit trade, blurring any distinction between formal and informal in value chain structures and the political system. They can front US dollars for farm produce such as maize and tobacco, even though marketing boards simultaneously exist (Shonhe, 2021). Unlike the Grain Millers' Association of Zimbabwe, they pay a better rate in US dollars at the farm gate, but only self-financed and contract farmers can take advantage of this. Both *makoronyera* and MNCs extract surplus value through illicit trade, which is exported to the detriment of farmers and the Zimbabwean national economy, while advantaging 'untouchable' (male) political elites (Hayson, 2019; Shonhe, 2021).

Informal trading practices are not only important for providing routes to market for people who are disadvantaged in official routes, but also when the official routes aim to extract heavily from the farmers, for example in the early stages of the Ghanaian cocoa value chain. In some countries, for example Malawi, informal export markets have become important sources for regional trade where crops are considered unsuitable for global markets and predictable markets have disappeared. Many of the traders in Malawi's informal groundnut export market are Burundian migrants, who work on commission to other marketers in Lilongwe or their villages and provide loans to farmers on the basis that their produce will be sold to them. The market relies heavily on social connections and the ability to speak Burundian languages, to the exclusion of most Malawians (Chinsinga and Matita, 2021).

This discussion has shown that it is a political choice to support farmers and other actors at a given scale in agricultural value chains. As O'Rourke (2017) notes, such political choices that involve intra-elite and clientelist relationships between men also serve to structurally exclude women, non-elites and wider social movements. This maleness in elite bargaining, political corruption and blurring of boundaries between public and private actors through illicit trade networks (Zimbabwe's makoronyera and tobacco MNCs linked to political elites being the clearest example) highlights the importance of questioning the gendered nature of political settlements themselves. Furthermore, a political settlements analysis of agricultural value chains also needs to take account of how the homosociality of the relationships described in this section and their policy implications affect intrahousehold power dynamics and shape social differentiation. The next section explores how these political settlements, value chain and wider social structures continually shape farmers', processors', distributors' and marketers' access to various resources and opportunities. It also considers the capacity of actors to make decisions about their livelihood trajectories within these structures and patterns of social differentiation.

3 SHAPING LOCAL LEVEL REACTIONS AND SOCIAL DIFFERENTIATION

The ways people are affected by shocks such as COVID-19, and their resilience capacities to deal with shocks are significantly shaped by the wider structures and political settlements discussed above, as well as long-term patterns of social differentiation. This section draws upon the findings from the APRA country studies to analyse how the effects of the COVID-19 shock have overlaid entrenched and emergent patterns of social differentiation for those involved in commercial agriculture.

3.1 Access to land

The nature of people's interest in agricultural land remains the most significant determinant of how they participate in agriculture. Access to land and tenure security also contribute to patterns of social differentiation. Land access and tenure are strongly affected by the longer-term political settlements and processes of liberalisation described in Section 2. While land dynamics interacted less directly with the COVID-19 shock, access to land had knock-on labour consequences for both landholders and the landless in agricultural value chains.

Access to land is shaped by historical and contemporary politics of land reform, as well as social norms and processes of land tenure (Berry, 1993; Agarwal, 1994; Razavi, 2003; Manji, 2006; Lund, 2008; Bernstein, 2010; Boone, 2014; Hall, Scoones and Tsikata, 2015). In several of the APRA countries, the legacy of colonialism has left patterns of customary land tenure among smallholder farmers where power is vested in traditional authorities, family lineages and household heads, or village governments, often as a matter of political expediency. For example, in Ghana since the 1990s traditional leaders have been custodians of customary land tenure and important actors in land markets due to the informal government 'policy of non-interference' (Ubink, 2008). However, where land is becoming commoditised, leases and share contracts are increasingly common, weakening kinship-based ties to the land, including women's usufruct interests (Tsikata and Yaro, 2014). In many of the APRA countries, traditional and communal systems operate alongside private property, although this happens in very different ways. In Nigeria and Ghana, multiple systems of communal or traditional ownership are recognised alongside a shift towards private property and commodification, facilitated by state administration.

Smallholder tenure is the main form of landholding across all the APRA countries and much land is held under customary tenure. For example, in Ghana, the 800,000 smallholder farmer households cultivate land sizes up to five hectares. Eighty per cent have control rights over the land they farm, while 20 per cent depend on sharecropping (Teye and Nikoi, 2021). Although traditional systems allow smallholders usufruct rights to land, increasingly, family heads and traditional leaders stand to benefit from transfers of land rights on a market, and may therefore encourage the development of such markets, often to the detriment of smallholders or traditional rights holders, especially in peri-urban zones (Nchanji, 2018). Land policy has had to recognise these various systems while responding to pressures to liberalise land markets. In Ghana, government policies now aim towards both large-scale commercial farming and nucleus-outgrower schemes (Schoneveld, 2013). The World Bank is strongly supporting efforts to fully bureaucratise the Ghanaian land administration system, reflecting continent-wide trends towards the liberalisation of land markets (Jayne, Chamberlin and Headey, 2014).

In recent decades, several of the APRA countries, including Ethiopia, Nigeria, and Tanzania, have turned towards liberalisation of the land sector with the aim of creating a favourable climate for investment. Within these more liberalised land markets, countries have promoted large-scale agriculture by granting land concessions to large companies, for example the Plan for Accelerated and Sustained Development to End Poverty 2005—2010 in Ethiopia, where land was leased to Saudi and India-based conglomerates. These large-scale land acquisitions in Ethiopia have been criticised for failing to provide opportunities for existing farmers or even in some cases to become operational at all (Alemu and Thompson,2020). In Tanzania, power over large-scale land investment policy for agriculture in Tanzania remains centralised, while village authorities retain responsibility for local level land administration. Policies including the Agricultural Sector Development

Programme, *Kilimo Kwanza* (Agriculture First) and the National Rice Development Strategy have promoted both large-scale and smallholder commercial agriculture, including collective rice irrigation and marketing schemes to double land planted with rice by 2030 (Mdoe and Mlay, 2021).

The Zimbabwean state is the one in our sample which has retained significant control over land tenure through its Fast Track Land Reform Programme (FTLRP) 2000, which bucked the trend towards large-scale agriculture seen in other countries. The programme created a trimodal land tenure system of small-scale A1 farmers, medium-scale A2 farmers and CA farmers, dispossessing former white commercial farmers in favour of these other farmers in the process. This policy is directly linked to intra-party politics of Zanu PF and inter-party politics (Scoones et al., 2010). There have been knock-on effects on other elements: European Union markets closed to Zimbabwean tobacco. Land redistribution has resulted in reduced labour supplies, as more smallholders own and work on their land (Moyo, 2011; Chambati, 2013).

Within these macro-structures of land access arrangements, individuals have turned to micro-level strategies to ensure access to land. Amanor, Yaro and Teye (2020) describe how this has happened in Ghana's cocoa sector in ways that draw on the interaction between labour and land. Traditionally, young family members provided labour on land, in the understanding that they may be able to inherit it. During the independence era in Ghana, land and labour scarcities contributed to a rise in sharecropping and caretaker farming, providing migrants land access and farmers a source of funds for inputs, which sharecroppers were often obliged to provide. Sharecropping was often a way into land access and sometimes ownership, as sharecroppers accumulated profits to buy land in new markets. However, increasingly, the sharecroppers were family members, and more formalised family sharecropper relations have now been recorded, where family member sharecroppers expect to receive a specified portion of the land or crop. This arrangement is more favourable than migrant sharecropping and replaces the understanding of general familial reciprocity of labour and inheritance of land. There are also cases of daughters influencing mothers in matrilineal systems to re-allocate family lands for inheritance by daughters rather than sons, in order to retain lands within the lineage (Amanor, Yaro and Teye, 2020). Through such routes, lineage members have been able to manipulate processes of access to land and inheritance. The household or private sphere can therefore be as important as the macro-level political processes generally examined by political settlements analyses.

Contract farming and outgrowing provide or support access to land and processing facilities for smallholders, though the effects on peoples' land tenure security are not the same for all schemes (Oya, 2013). Nigeria's nucleus farm model for rice production guarantees market access, capacity building and quality control, but farmers have limited control over decision-making and are contractually bound to the estate for the land that they farm. By comparison, Nigerian rice outgrowers cultivate their own land and repay for inputs at a preferential rate, while independent smallholders have greater autonomy but with access to lower quality inputs and reliance on government extension officers (Aiyede, 2021). In the Ghanaian palm oil sector, the situation is similar for independent smallholders, while under nucleus-outgrower schemes the estate has the right to take over a farm in the event of any contractual violations until loans have been fully repaid (Asante, 2021).

A rise in medium-scale farming is often more associated with wealthier entrants to farming than smallholder consolidation of land (Jayne, Chamberlin and Headey, 2014; Muyanga et al., 2019). However, in Malawi both groups have acquired medium-scale landholdings (an estimated 54 per cent resulting from small-scale farmer accumulation, and 45 per cent from urban-based professionals) (Answeeuw et al., 2016). This has often been to the detriment of groups with weaker access to and control over land, particularly women and youth, creating barriers to their participation in the value chain (Chinsinga and Matita, 2021). When smaller-scale farmers or specific social groups lose access to fertile, irrigable land, they may end up labouring in addition to working on their own holdings (Mutabazi, Wiggins and Mdoe, 2013). This has been the case in Malawi, where women are reportedly facing displacement following the collapse of tobacco as a cash crop and men turning to groundnuts, that had hitherto been socially regarded as 'a women's crop' (Chinsinga and Matita, 2021).

Gender is a critical factor in terms of land-based social differentiation (Doss, Summerfield and Tsikata, 2014; 2015; Dancer and Tsikata, 2015). Doss et al. (2015) point out that reliable data on gendered access to land are scarce and rarely nuanced enough to provide insight. Land may be held jointly, and access to and control over land is as relevant as 'ownership', however that is defined. Nevertheless, women generally have sole control over much less land than men do. Household headship and gendered customary practices of land tenure are important factors here. While overall household productivity may be higher in marital households where men and women perform complementary productive roles, women who are household heads may have greater agency than married women in terms of their own participation in agriculture.

Overall, in the countries studied, women were in the minority of landowners. In Ghana, matrilineal and patrilineal systems of land tenure mean that only a small proportion of women smallholders have control over land in their own right, whether as household heads of members of a household. Similarly, largely patrilineal systems of customary land tenure in Tanzania make men the main inheritors of family land, and they have more power to purchase and have land allocated to them, while women are more likely to rent or purchase land. In Nigeria, women were half as likely as men to purchase land and twice as likely to rent it. Women's plots were smaller and less than half a per cent were irrigated (Oxfam Nigeria, 2019; Aiyede, 2021). The bundle of rights associated with land tenure in turn affects management control and gendered divisions of labour over the land (Ribot and Peluso, 2003; Doss et al., 2015). Other gendered dynamics act not through individual land rights but through the effects of large-scale land acquisitions. Daley and Pallas (2014) show that large-scale land deals generally have more negative effects for women than men, because of their weaker tenure rights and reduced access to common property resources following such deals.

Differential access to land by gender is also shaped by political and value chain structures. A clear illustration of this is the Zimbabwean tobacco and maize sectors. While 25 per cent of A2 women farmers participate in Command Agriculture for maize production, none have access to contract farming. By contrast in the tobacco sector, 20.7 per cent of women farmers, not necessarily only as household heads, are involved in contract farming. This is because the financing structure in the tobacco sector makes it in the household's interest for both spouses to enter into separate contracting arrangements with private tobacco firms to maximise the household's overall access to finance (Shonhe, 2021).

Chinsinga et al. (2021) have described how women have often been unable to secure access to land through inheritance in Malawi, despite attempting to draw on traditional and legal fora. Several cases were reported where a deceased man's family members removed their kinsman's widow and sometimes children from land. Women were usually unable to seek recourse through traditional systems, where traditional leaders were increasingly seen as corrupt in a context of deepening land markets and rent payments. Many women tried to take cases to district courts, perceiving these as more impartial. The high costs of these legal proceedings were reported to have impoverished women in several cases, without guaranteeing that they would regain access to land. The state of land law in Malawi also prolonged cases, as old land laws have been repealed without replacements being instituted.

Social differentiation in the management, control and use of land affects people's relative abilities to react to shocks such as COVID-19. In some cases, exclusion from land control can reduce the ability of agricultural labourers to deal with shocks, in the sense that they have no other livelihood or subsistence option to turn to when income generation from labouring becomes impossible. Smallholders may also be less able to deal with shocks by taking actions such as stockpiling to take advantage of higher process later. These actions are not specifically because they hold a small amount of land, but because of the other low resource endowments associated with this. Those who benefit from smallholder schemes or outgrowing can sometimes avoid these types of effect if the nucleus company can cushion the shock. Large businesses equally experienced disruption and inability to trade in the COVID-19 pandemic but were sometimes more able to bear it because they had more capital.

Overall, the data presented in the source papers on the theme of land provide evidence for a system where some parties are advantaged within different aspects of the architecture. For example, political settlements have favoured large companies who wish to acquire land, and men are generally favoured within traditional structures. Less advantaged actors, such as smallholders and women, attempt to negotiate their own access to land within these structures.

3.2 Access to labour

The organisation of labour varies across different types of commercial farming. Free nuclear and extended family labour as well as paid non-family labour are important to smallholders in all the value chains considered, including outgrowers and contract farmers, with sharecropping also especially prevalent in cocoa value chains. Associational labour also plays a small and diminishing role. Larger-scale agriculture, less well represented in our sample, relies more on wage labour, as may medium-scale farming. Feminisation of the labour force is a hallmark of commercialisation (Standing, 1989; Kabeer, 2003; Dunaway, 2014) and gendered labour is common in agricultural value chains (Dolan and Sorby, 2003). Some studies have shown that large-scale agriculture has a particularly negative impact on labour patterns and wage inequalities (Sajhau and Von Muralt, 1987; Julia and White, 2012). However, the availability of relatively well-paid labouring opportunities on large estates and sometimes medium-scale farms can also provide valuable job opportunities (Smalley, 2013; Hall, Scoones and Tsikata, 2017). Who benefits depends on how well the farm is integrated into a local economy.

Advantage is not automatically conferred to those traditionally tied to a given task set. The ownership of capital determines who can profit from the use of labour at various value chain stages. For example, in the APRA study countries, marketing and oil processing in West Africa are often the domains of women, while in Tanzania, women dominate rice production but are more excluded from the more lucrative processing (Mdoe and Mlay, 2021). In palm oil in Ghana and the maize value chain in Nigeria, although women dominate production, equipment is often owned by men (Asante, 2021; Amaza, Mailumo and Silong, 2021). The Ghanaian palm oil value chain illustrates how men may have more opportunity to process more lucrative high-quality oil, whereas women are predominantly in the artisanal sector processing oil with a lower market price. When women's and men's labour is unequally remunerated, male owners of land and processing equipment are often able to profit from this. In the Malawi groundnut sector, gender, class and migrancy intersect in terms of who benefits from technical innovations. Here, richer male Burundians have had the capital to invest in electric groundnut shelling machines, whereas most of the manual machines are owned by Malawians. All the machine operators are male, and those engaged in sieving and grading after shelling are women (Chinsinga and Matita, 2021).

The form of commercial agriculture that labourers participate in matters for social differentiation. In the study countries, labour relations tend to be organised in ways that disadvantage poorer farmers and those who own less, or no, land and other capital. In Tanzania, these farmers often end up selling their own labour at the start of the season to purchase other inputs, and so sow late, disadvantaging them and widening the gap between them and their more advantaged peers. In recent years, this has been exacerbated by the increased use of oxen, expanding cultivated areas, and raising competition for land and labour (Isinika and Jeckoniah, 2021). In the rice value chain in Ethiopia's Fogera plain, labour is mostly provided by rural youth without access to their own land (Alemu and Assaye, 2021).

When farmers have an opportunity to become contract farmers, this can mediate the dynamics. Contract farming arrangements in Zimbabwe may occasionally support the contract farmer with labour costs, reproducing any advantage that enabled them to become contract farmers initially (Moyo, 2011; Shonhe, 2021). Hence, some complain that input schemes without such a facility are less useful for tackling social differentiation, with the landholdings and incomes of women contract farmers being less than men, whether they are household heads or not. Evidence from Zimbabwe also shows that the form of the value chain matters. Chambati (2013) describes how tobacco farmers and contract farmers tend to receive higher wages, more often on time, than others. However, the transition from labourer to farm owner remains harder for women and non-autochthons. Women may be disadvantaged in customary land tenure systems where they stand not to inherit any of their husband's land they may have worked on. Some Ghanaian women have been excluded from working on their husband's cocoa or palm oil farm when he can afford non-family labour (Asante, 2021; Teye and Nikoi, 2021), presumably to deflect her claims to it later. Where women and youths have gained access to farms, this has resulted less in consolidation of land than in a proliferation of smallholders.

Labour dynamics can intersect with land access in less predictable ways as the nature of commercial agriculture changes through time, and this influences social differentiation over the longer term. This is particularly evident in Malawi as men turned to the groundnut value chain following the demise of tobacco, displacing women from the chain in the process (Chinsinga and Matita, 2021). Extended family labour and reciprocal or cooperative labour was historically important in Nigeria's cocoa value chain but became less so as paid labour became more common, especially as cocoa was promoted by government as an export (Aiyede, 2021). Farmworkers without traditional ethnic or regional ties to cocoa migrated to provide labour in cocoa farms. Some gained access to land through this, some through renting or leasing land. In moments when the price of labour rose greatly, labourers who were able to save gained the chance to purchase the cocoa land they had worked on when land law reform in 1978 made this possible. Non-agrarian factors influenced that labour cost: the Biafran war and the oil boom slowed the provision of labour to cocoa, decreasing cocoa output, as labour flowed to the East and to cities. This lack of labour also promoted sharecropping, which farm owners saw as a way to retain labour.

Conjugal and household relations have a bearing on how family labour is used. Married women may have more control over money gained from their own wage labour than profits from household scale contract farming (Maertens and Swinnen, 2012). Family breakdowns can also make female labour less available to some male farmers. Women may manipulate labour relations to try to escape disadvantage or gain advantage, for example, when Ghanaian women were disadvantaged by matrilineal land inheritance, they withdrew labour from their husband's cocoa farms, or charged for it (Tsikata, 2015). The same may happen in the sunflower value chain in Tanzania. Women may find it advantageous to continue to promote systems where their immediate advantage is not obvious.

In general, women, youth and smallholders are less advantaged in terms of profiting from provision of labour and accessing it, because they have less access to capital over the longer and shorter terms. Hall, Scoones and Tskikata (2017) note that women and youth often take part in wage labour to diversify their livelihood strategy and share risk, but that they may then be placed in a more precarious situation if they have no capital or land of their own to fall back on. These facets of identity and precarities intersect and compound as women are likely to be smaller-scale farmers. Similar points pertain to migrants in a value chain as a consequence of dynamics of migration and land access.

The intersectional disadvantage these people experience means they often lack opportunities to exercise agency in response to labour availability shocks like COVID-19. Labour is strongly affected by fluctuations in prices of goods, which influences how much farmers can pay for labour, which in turn affects labour supply, including family, and non-family local and migrant labour. Shorter-term changes in the price and availability of labour, as happened in response to COVID-19, can have especially strong effects for smaller-scale farmers, because they generally have less capital at their disposal to afford higher labour prices. The increased number of smallholders owning their own land can exacerbate such labour shortages. In Ghana, free secondary school education has apparently reduced the pool of available workers (Teye and Nikoi, 2021). Women farmers particularly can no longer afford to pay for labour and, if not household heads, cannot access free labour from young adult family members.

In the COVID-19 shock, production was also affected by mobility restrictions that prevented labourers reaching the fields, for example in the Malawian groundnut chain, the Nigerian maize and rice value chains, and the cocoa value chain in both Ghana and Nigeria (Aiyede, 2021; Amaza, Mailumo and Silong, 2021; Teye and Nikoi 2021). Changes in labour mobility had varying effects, even within a given chain. For example, some Ghanaian palm oil farmers and processors reported a surplus of labour due to reduced processing operations, whereas others reported lack of migrant labour due to reduced migration flows (Asante, 2021). Data from another data collection effort within APRA showed differential effects on labour flows and costs across countries (Carreras, Saha and Thompson, 2020). A telephone survey specifically on COVID-19 effects reported that labourers in Ghana, Nigeria, Tanzania and Zimbabwe were still finding it hard to access off-farm work by September 2020, with female-headed households in Zimbabwe being worse affected than male-headed households. Tom (2020) reported that some labour markets in Zimbabwe closed temporarily and were open again by April 2020. Simultaneously, farmers in Ghana, Kenya and Malawi continued to struggle to access hired labour, with Ghana, Nigeria, Ethiopia and Zimbabwe reporting higher prices. Our own data showed that, in some places, labour requirements had been largely met by specific groups of people, and in these places, restrictions to the movement of labour have not only impacted owner-farmers, but also these groups of farm labourers. Elsewhere, farmers laid workers off, which has a similarly negative effect on those who rely on farm labouring for income.

Landless labourers were not able to control whether they had access to work or not. For example, in Ethiopia's Fogera plain, rice labour was largely provided by young people, who became unable to access this income source (Alemu and Assaye, 2021). Those who did access work were occasionally able to profit from higher labour prices but had to accept the risk of catching the disease at work to do so. In Nigeria's maize value chain, those able and willing to work were able to demand wages of up to 100 per cent more than usual, as the pandemic hit in the sowing season, and many other labourers chose to stay at home for fear of contracting the virus or were forced to do so by movement restrictions (Amaza, Mailumo and Silong, 2021). This resembles what happened in the Biafran war and oil boom, when labour prices rose, enabling many labourers to accumulate capital and eventually buy land. In this value chain, there were hints that smaller-scale businesses used more labour per unit of output. In some value chains, crops had already been planted by the time the pandemic broke out, so output was less threatened. For these value chains, including rice in Ethiopia and sunflower in Tanzania, subsequent seasons will be more of a concern.

The evidence on labour again shows a situation of structural disadvantage for some groups, especially women and youth, and the way this works is tied in many ways to patterns of land access. Individuals do find ways to negotiate more favourable positions within these structures, sometimes by drawing on or engaging with alternative structures, such as contract farming.

3.3 Access to credit and capital

The inclusive commercialisation agenda, exemplified by CAADP, has encouraged more widespread provision and uptake of formal credit routes, with a particular focus on women and, to some extent, widening access to smallholders who have traditionally lacked access to formal credit. For example, Nigeria's Anchor Borrowers Programme has a component focusing on smallholders while the Incentive-based Risk Sharing System for Agricultural Lending and the Commercial Agricultural Credit Scheme continue to target larger businesses. Still, credit uptake by smallholders and across the agricultural sector in general is lagging, and there are allegations in Nigeria that the process is riddled with corruption (Aiyede, 2021).

Policies aiming to open up credit to smallholders have not had much effect on the real availability of these services to the most disadvantaged, probably because their effectiveness is also tied to a need for public investment (Wiggins et al., 2011; Jayne, Chamberlin and Headey, 2014). For example, finance institutions find it unattractive to offer credit to smallholders living in remote locations poorly served by transport and communications infrastructure, as this makes it difficult to follow up in instances of default. Much has been made of land titling schemes targeting women and smallholders, which will ostensibly provide them with the ability to pledge their land as collateral for agricultural finance. There have been few academic reports of the success of such schemes. This may be because titling schemes are not yet very widespread, or because they are not considered to be of much use by smallholders who already enjoy usufruct rights to farms, or by medium-scale farmers who can lease. Smallholders may not feel the need to engage in formal credit when low-interest options are available to them, for example from marketers. Credit agencies also may find it too risky to lend to such farmers, bearing in mind the difficulties of extracting collateral in the event of default, especially in contexts where the practical and legal structures to do so are weak. There are also the ethical considerations of encouraging a smallholder to pledge their land as collateral for a loan to work on it, in what is an inherently risky business (Wiggins et al., 2011).

Many farmers, processors, input suppliers and marketers, especially those operating at a smaller scale, have longstanding informal and private credit relations. These loans are often of small amounts, interest free and tied to delivery of goods. For example, Tanzanian sunflower producers arrange interest-free credit with the Kenyan traders who purchase their goods (Isinikah and Jeckoniah, 2021). These small-scale credit relations may be at least partly guided by logics of social reciprocity. Although amounts lent are small and rarely provide an opportunity to expand a business, considering their relatively generous terms they sometimes provide small-scale operators with a cushion in the case of shocks, as compared to larger, more formal interest-attracting loans with fixed repayment schedules (Bellwood-Howard et al., 2021). In the Ghanaian cocoa value chain, farmers may engage in such relations, but also obtain credit through local buying companies (Teye and Nikoi, 2021). Simultaneously, large agricultural companies can obtain agricultural finance from banks, secured to land or other collateral. Outgrowers can occasionally gain access to loans through other channels. In the case of the Zimbabwe tobacco sector, the international nature of the value chain provides nucleus companies with opportunities to use offshore loans and sell them to farmers (Shonhe, 2021).

Access to credit is associated with more ready capital. It is possible that those with better capital endowments cope better with crises such as COVID-19, as resilience capacities involve having the resources to weather periods with low sales, for example by waiting for markets to re-open, or by investing in alternatives. Smallholders who lack access to ready and untied credit, are in a disadvantageous position to be able to weather such shocks. However, the COVID-19 crisis also generated negative effects for those in larger businesses who could sit out periods of lower sales. Drops in revenue meant that business owners had to lay off employees, and many were unable to repay credit, as they lost access to export routes and dropped contracts. This had knock-on effects for lenders. The effects of COVID-19 itself on the availability of credit varied widely across countries. Carreras, Saha and Thompson (2020) reported that, by July 2020, there were decreases in the availability of credit in Ghana and increases in Nigeria, Malawi and Zimbabwe.

3.4 Access to other movable inputs

Though direct government support of farmers with inputs has been unpopular since the 1980s, the 'African Green Revolution' advocacy of the 21st century has suggested that it is acceptable to temper an entirely liberalised input provision sector with 'smart subsidies': more targeted, with a specific focus on supporting smallholders (Sanchez, Denning and Nziguheba, 2009; Nziguheba et al., 2010). Access to movable inputs is strongly influenced by political settlements, including government interests in creating alliances with private sector actors and development partners and gaining the support of voters. The possibility of modernising and privatising input support programmes has not done away with relations of political patronage from government. Tanzania has followed a typical pattern, introducing subsidies in the 1960s, removing them in the 1980s due to donor pressure, and reintroducing them in 2004, partly as an electoral tool (Mdoe and Mlay, 2021). In Tanzania, the new configuration explicitly aims to generate profit for the private sector, so is less vulnerable to claims of nepotism or untoward practice.

Private sector companies in the fertiliser, seed, agrochemical, and machinery industries are now well integrated into government input support initiatives, as it is claimed that they can supply inputs in a more efficient manner. The Nigerian Anchor Borrowers' programme and Agricultural Transformation Agenda are examples of this. They are supposed to tackle corruption and inefficiencies, and therefore brought the private sector into improved seed distribution and credit provision, as government procurement had been associated with rent seeking. These types of schemes are meant to replace the Nigerian Growth Enhancement Support Scheme, which provides fertilisers, other agrochemicals, and planting materials to smallholders. Cooperative organisation membership is sometimes helpful or necessary to gain access to inputs distributed through such centralised schemes. However, the scheme has been criticised for providing poor quality inputs, as of late.

Legislation has been necessary to incentivise the private sector in some domains. Recently, a set of seed laws has been passed across Africa to enable seed patenting, to attract more private sector investment in the sector. Examples include the 2019 Nigerian National Agricultural Seeds Council Act (NASCA). This has been contentious, as activists claim it criminalises non-commercial seed procurement. Simultaneously, advocates argue that a seed sector which is more profitable for researchers, producers and distributors will make better quality seed available to smallholders, raising their yields and incomes. It is too early to know what the longer-term effect will be, although Amaza, Mailumo and Silong note that since NASCA was passed, in the seeds sub-sector, it is the government and seed producing companies that have had the highest numerical cost-benefit ratio, with smallholder farmers having the lowest (Amaza, Mailumo and Silong, 2021, p. 23).

In the context of national and continental scale input provision regimes, farmers of different resource endowments have different abilities to access inputs. In the Malawian groundnut chain, more affluent medium-scale farmers have been most able to capitalise on opportunities in seed innovation, using land to grow seed rather than groundnuts. Medium-scale farmers who are new entrants to the sector often acquire land from smallholder farmers who become landless labourers in the process (Chinsinga and Matita, 2021). The general government-run schemes can, in practice, favour government contacts and voters over the short term, but it is hard to observe sustained advantage for a particular group as political cycles tend to favour different groups over time.

Outgrower schemes provide an alternative route whereby smallholders gain access to inputs, as company nucleus farms provide inputs to their outgrower farmers, for example the Tanzanian rice value chain (Mdoe and Mlay, 2021). Outgrower schemes tend to favour those who have the resources to become an outgrower in the first place. If implemented with the benefit of smallholders in mind, generally they will advantage those who have management control over land. Women with limited access to resources have often lost out in such contracting arrangements (Schneider and Gugerty, 2010; FAO, 2011). Schemes with a specific focus on gender and smallholder access are more targeted; but there is limited evidence that they have made a substantial, widespread difference for women (Daley and Park, 2012). The style of the scheme through which input support is organised interacts with the prior resource endowment of a given farmer to determine how they benefit. Those with access to labour, land, transport, bank accounts, mobile phones and knowledge of how to use inputs and access systems (e.g. e-platforms) are more able to benefit. Access to these resources does not necessarily have to mean ownership, and can be through family and community members, hence why cooperative involvement and high levels of social capital are also advantageous. For all schemes, some other kinds of public goods, such as road infrastructure, also have to be in place (Jayne, Chamberlin and Headey, 2014).

In terms of ability to weather shocks such as COVID-19, timely input supply is critical to successful farming. Disruptions to input supply place farmers in vulnerable positions, especially those who rely on subsidies. In the case of COVID-19, movement restrictions in the early months of the pandemic also disrupted input supply, creating a similar type of problem as the disruption of labour did for farmers who were at the production stage of their crop cycle when movement restrictions came into effect, for example in the rice, maize and cocoa value chains in Nigeria, and cocoa and palm oil value chains in Ghana. This also had negative effects for input suppliers and distributors, who could not make sales. Some retailers demonstrated resilience, for example those in Zimbabwe who sold their fertilisers in smaller bags to be able to maintain a business, but it was harder for farmers to enact these types of responses, given that timely planting and harvesting is critical to successful production. These disruptions were noted by Carreras, Saha and Thompson (2020) to be particularly widespread in Nigeria in the early stages of the pandemic, and towards the end of September 2020 in Ethiopia.

For those farmers who had already planted crops, production was threatened by the inability to get inputs to the field in a timely fashion, given movement restrictions. For example, in the Nigerian rice value chain, the effects of interstate movement restrictions were exacerbated by opportunistic officials harassing fertiliser transporters on the roads and increases in transport fares (Aiyede, 2021). Fertiliser prices rose because of slowdown in production of fertilisers produced abroad. Smallholders with lower capital stocks are less able to bear these increased costs. Simultaneously, low demand was reported by input suppliers when farmers, such as in the Ghanaian cocoa value chain, were unwilling to travel to urban areas to purchase supplies (Teye and Nikoi, 2021).

The data above show that there is ample room for political settlements to influence the structures within which individuals access movable inputs, though individual value chain actors have some room to manoeuvre within the structures created by these settlements.

3.5 Access to markets and favourable prices

Differential resource endowments of farmers, traders and processors shape their ability to access markets. Large-scale investors have been drawn into commercial farming, sometimes encouraged by tax breaks and incentives. In the Tanzanian sunflower sector, for example, oil producers were attracted to invest in production in reaction to import taxes on a competitor product, imported palm oil. Some develop outgrower programmes, often providing inputs and sometimes credit, thereby passing on some of the benefits for investors to outgrowers. In this way, outgrowing can provide ways for smallholders to access inputs while being guaranteed an output market. Smallholders tend to achieve more short-term gains when they are supported by governments, which often happens around election times in attempts to win favour and votes. However, outgrower schemes can sometimes alter this dynamic, where they allow smallholders to take advantage of the ability of larger players to forge ahead in competitive markets. This has happened in the Nigerian rice value chain and in the Tanzanian sunflower value chain (Aiyede, 2021; Isinika and Jeckoniah, 2021).

One disadvantage of outgrower schemes is that smallholders may become tied to selling to a specific buyer if they accept inputs from them. On the other hand, in many cases, as in the Ghana palm oil value chain, side-selling by smallholders is widespread (Asante, 2021). Many smallholders sell on these open markets, or 'decentralised markets' (Wiggins, 2011). Despite inefficiencies and a lack of supportive policies, many smallholders have maintained longstanding relations with local traders or engaged in regular spot markets over years and decades (Mutabazi, Wiggins and Mdoe, 2013). Public investment in irrigation, fertiliser subsidy or infrastructure, such as roads and electricity that would make such engagement more efficient, has not always been forthcoming. An example of where this has happened, however, is the Singida region in Tanzania, where general development, including electrification, promoted the development of sunflower oil processing (Isinika and Jeckoniah, 2021).

Such local, small-scale markets do not necessarily provide opportunities to make large profits. Lack of standardisation and regulation may also provide space for marketers to exploit small-scale farmers, for example, by manipulating weights, as is described for the rice value chain in Ethiopia (Alemu and Thompson, 2020). Yet they have relatively low entry barriers and provide a route to market for smallholders and traders (often women) who have not gained access to the outgrower or export markets above, or who are not supported by governments with targeted subsidies, irrigation schemes or other infrastructural investments. These markets would be a logical intervention point for other actors seeking to improve the terms for the smallest and poorest farmers and traders.

Poor farmers and traders may benefit less from targeted agricultural interventions such as credit and fertilisers than from general infrastructural development such as roads, transport electrification, and possibly import substitution by import tariffs (Wiggins et al., 2011). Although individuals may use social relations and negotiations within such markets in order to gain relative advantage, appropriate infrastructure is still necessary to make conditions more generally advantageous for all market actors. In situations of bifurcated markets, for example the internal and export markets in the palm oil chain in Ghana and the rice chain in Tanzania, the ability of different groups to access these markets will determine the prices and advantages they can gain from commercialisation. In the case of palm oil in Ghana, those who do not have capital to invest in the varieties of palm preferred by external markets will not be able to trade in export markets and gain access to higher prices. Market actors who cannot engage in markets which provide favourable prices will be relatively disadvantaged. This has happened over the longer term for many and, simultaneously, longer-term patterns of differentiation have prevented some from gaining or retaining access to the most favourable market opportunities in shocks.

A sudden change in access to markets and favourable prices was the most immediate effect of the COVID-19 shock. Carreras, Saha and Thompson (2020) found that farmers in all APRA countries except Ethiopia found it harder to sell goods since COVID-19 although, in Nigeria and Zimbabwe, this had improved by September 2020. Our data showed that those who were embedded in local markets retained the ability to trade to a greater extent than those dependent on export markets. Simultaneously, those with more capital, sometimes provided by access to credit, were able to sit out a period of non-access to markets or unfavourable prices, and sometimes even profit by stockpiling, in anticipation of a return to trading at higher prices. Tom (2020) points out that Zimbabwean farmers exercised agency in the face of market closures, turning to selling on the roadside and in other unofficial places. Reduced mobility and inability of goods to leave the farm gate negatively affected farmers, who relied on being able to sell on to small- and large-scale traders. Traders themselves could not gain access to crops and had reduced opportunities to make sales. In Tanzania, for example, not only was less sunflower oil purchased from villages, but less traffic on the roads meant that opportunities to make roadside sales declined, posing problems for small-scale informal traders and farmers (Isinikah and Jeckoniah, 2021). Ragasa and Lambrecht (2020) point out that distribution problems disproportionately affected women traders, who frequently dominate informal food markets, and governments did not always adopt a gender-specific approach in response. Alemu and Thompson (2020) report how farmer stockpiling had, in anticipation of preferable prices, forced many aggregators out of rice markets. Simultaneously, many processors switched to purchasing and stockpiling paddy.

There were knock-on effects for processors and exporters. In Ghana, border closures led to cocoa stockpiles (Teye and Nikoi, 2021). Transport costs increased as drivers were stopped from moving or were less willing to risk their health on the road. This affected all value chain actors, from farmers to exporters. The few drivers who remained on the roads profited from greater competition for their services, while others lost income. Where there were food security effects, these were more a result of transporters and traders being unable to move food to markets, and workers being unable to gain cash to purchase food with, rather than harvests being disrupted by low labour availability at planting. The latter effect may be more relevant in the coming season.

Effects on prices varied across and between countries, influenced by a complex set of factors, including a crop's import and export status and the change in demand for it. Farmers and traders in various locations were affected in unpredictable ways, conditioned by existing value chain dynamics, including whether the crop in question could be sold locally or to a different buyer, and its role in national food systems. Because farmers normally benefit from higher prices, and consumers from lower prices, the ability of government to set prices is a major tool in whether they can gain the support of these groups. It is therefore dangerous for government when prices fluctuate beyond their control, as happened in the COVID-19 shock.

Where governments included food crops in emergency relief packages, increases in demand advantaged farmers, traders, and processors to a certain extent, for example in the case of rice millers in Nigeria (Aiyede, 2021). In Ethiopia, imports of basmati rice from Asia declined, so prices rose, and some farmers and traders stockpiled or held rice back, anticipating prices that had already risen would rise further. In this case, the low availability of the product, rather than the price rise, created problems for traders (Alemu and Assaye, 2021). The Nigerian government discourages the maize trade, focusing instead on self-sufficiency. Nevertheless, slightly more maize is imported than exported, and the price rose during the pandemic (Amaza, Mailumo and Silong, 2021). In these situations, farmers benefited from the price increases, at least while demand remained high. However, traders were less able to purchase as much to sell on and consumer food security was affected.

Decreases in trade, including exports, lowered prices. In Malawi, ADMARC markets were affected, which made it more difficult for farmers to dispose of groundnuts, forcing them to sell to middlemen and market brokers at very low prices (Chinsinga and Matita, 2021). In Ghana, there was reduced demand for palm oil from restaurants and school feeding programmes, as well as a pause in exports. Overproduction at the international level also contributed to the overall decrease in prices. The decreased demand and lower prices disadvantaged exporters, small-scale producers, processors, and traders (Asante, 2021). By comparison, in Zimbabwe, maize is an important local and national food item. While larger-scale long-distance traders were unable to access farms, which led to price drops overall, farmers were able to switch to alternative local buyers if sales fell through (Shonhe, 2021). In Tanzania, it was reported that farm gate sunflower oil prices fell due to fewer traders travelling to villages to source goods, reducing competition; as well as the reluctance of neighbouring countries to admit Tanzanian trucks, partly because Tanzania did not enforce a lockdown. Cross border sellers could therefore not trade, and trucks that did travel were slowed down due to extra checks. Traders could not obtain credit for sunflower seed cake, so the cake price also dropped (Isinika and Jeckoniah, 2021). Tanzania also exports rice, so prices similarly dropped as regional exports became less possible and goods stockpiled (Mdoe and Mlay, 2021). This also happened even in cases where theoretically there were no restrictions on food crops moving across the border, for example in the cocoa value chain in Nigeria and Ghana. Here, warehouses filled up, leaving farmers unable to sell on their goods, and creating backlogs on farms (Aiyede, 2021; Teye and Nikoi, 2021).

There is some evidence that smaller processing businesses and smallholders were less able to cope with price changes than those with larger holdings or reserves. In Tanzania, larger-scale farmers were able to stockpile large amounts of rice for future sale or sell smaller amounts in a more local market when they could not export (Mdoe and Mlay, 2021). In contrast, smallholders and women informal traders were often less able to take advantage of price changes. In Tanzania, women are the major informal traders and tend to lack access to formal social safety nets, which meant that they could not afford to wait for sales by stockpiling. In Ghana, smaller-scale palm oil processors rely on the ability to sell quickly to survive and could not benefit from stockpiling oil (Asante, 2021). In Zimbabwe, smallholders found it impossible to stockpile maize, but managed by selling small portions at lower prices (Shonhe, 2021).

The papers that this working paper draws upon provide several examples of negotiation and resilience capacity of individuals and small groups. However, the data also show that elite actions and, often, political settlements, at higher levels shape the structures that these individuals act within.

3.6 Access to alternative and non-agricultural opportunities

The COVID-19 response showed that the fate of agricultural value chain actors is conditioned by factors both within and beyond the agricultural sector. Those who have abilities and capacities for resilience were able to move position within the value chain or even move to non-agricultural activities. Actors working at the smallest scale are often pursuing multifunctional livelihoods. Whilst lacking the capital stocks and access to safety nets that can enhance their robustness to shocks, they may have skills to support a resilient response, including experiences learnt from past shocks, for example price fluctuations or new regulations that forbid or encourage imports. For many agricultural value chain actors in Africa, COVID-19 will not be the most severe shock they have experienced, while simultaneously resembling other shocks in some ways. Other shocks, for example locusts, drought, war, market collapse and land loss, have highlighted the existing distribution of power and capital in a value chain, as well as the resilience of people engaged in agricultural value chains and livelihoods that are unpredictable.

In the study countries, some actors responded to COVID-19 by moving into activities at another point in the value chain; some moved to activities linked to their value chain; some moved out of agriculture; and some moved to other value chains. Responses often reflect the opportunities and pressures that already confront these people. For example, while some Ghanaian palm oil producers were able to scale down production and store processed palm oil, smallholders elsewhere were unable to stockpile as they rely on regular sales (Asante, 2021). Tanzanian sunflower oil producers reported switching to other crops as oil prices dropped (Isinika and Jeckoniah, 2021), although this only works if those other crops have not been similarly negatively affected by COVID-19. This response will have been especially important for women, as Mosha et al. (2021) report that diversification of sunflower-related livelihood activities led to increased women's empowerment. In Ghana, some palm oil producers switched to activities related to the commodity they deal with, for example soap production. Some even turned to social media advertising to remain within the value chain (Asante, 2021). Others in Tanzania moved into non-agricultural activities, for example opportunistically making or selling face masks or hand sanitiser. In Malawi this also happened on a larger scale, with well-established Afri-SMEs positioning themselves with local government, non-governmental organisations, and community-based organisations to supply COVID-19 products and services, including personal protective equipment (Chinsinga and Matita, 2021).

4 CONCLUSION

Long-term patterns of social differentiation are shaped, directly and indirectly, by government policies and their interaction with development trends, value chain structures and processes of social and agrarian change. Advantage can be conferred to certain groups when governments make a concerted long-term effort to shape land and agricultural markets, control imports and exports, or provide inputs and facilitate other kinds of access to resources. However, such interventions have little meaningful impact when carried out over the short term.

In the current era of land market liberalisation and commercialisation of African agriculture, governments and international actors have often pursued interventions that benefit the more powerful actors in value chains, for example through facilitating access to land markets, tariff and tax concessions, seed laws, or fertiliser subsidy privatisation. These are often rooted in political settlements that allow those with more assets to become or remain larger-scale farmers. Larger-scale agricultural investors, including processors and traders, also benefit, as well as traditional authorities in some cases.

In the case of smallholders, governments have tended to interact politically in more short-term ways, for example by providing inputs or export bans at politically sensitive times. Otherwise, smallholders tend to use their own resources to commercialise, where public goods such as roads, healthcare and childcare, which are necessary to make markets work for smallholders, have not consistently been developed to the extent that is needed. But critiques of political settlements literature remind us that we also need to look at these actions of smallholders to understand how the agency of non-elites affects their own trajectories. The ways smaller-scale marketers, farmers and processors managed through the COVID-19 period provide examples of agency and resilience capacity, whether by switching to new trading partners, sales modes, or crops, or even moving into non-agricultural activities.

Nevertheless, commercialisation in any form is likely to cause differentiation, entrenching existing patterns over the medium and long term (Wiggins, 2011). The greater the degree of commercialisation, the greater the differentiation. Smaller-scale traders can be made worse off in real terms when larger scale marketers outcompete them, for example in preferential access to lucrative export markets, which was reported to different extents in the APRA study countries. However, larger-scale farmers and smaller-scale farmers can also interact with each other in more complementary ways, such as in the case of the more inclusive outgrower or contract farming schemes. In these ways, actors exercise agency within processes and structures of commercialisation.

Land tenure systems linked to kinship relations continue to have the most significant structural long-term effect on who benefits from commercial agriculture and how. Across the APRA countries, agrarian structures embedded in gendered social power relations, mean that women are less likely to own land or to be a larger business owner. Women are more likely to be smallholder farmers or labourers because of their historically weaker access to land. Women in general are more likely to provide unpaid care than men, leaving them with less time to run their businesses. In some contexts, they are less likely to own heavy plant machinery, and are therefore overrepresented in artisanal and less lucrative sectors, for example in the palm oil value chain in Ghana (Asante, 2021). Women farmers tend to earn less than men and are less likely to have access to the higher prices available in international markets. In Ghana, for example, women cocoa farmers earn on average 25-30 per cent less than men (Teye and Nikoi, 2021). As traders, in many contexts there is a tradition of women dominating local and national scale markets. Yet, these women traders, like women farmers, are less likely than men to gain access to larger amounts of credit which are available through formal channels. Women traders are also less likely to be engaging in lucrative global value chains. However, some government and civil society actors have sought to favour women in value chains through schemes such as the Cadbury Cocoa Partnership and Cocoa Life in Ghana, which seek to increase business opportunities for women and youth.

Ethnicity and migrancy/local citizenship also cause differentiation in access to land and labour opportunities. In many cases, migrants may, at least in the short term, often only have the option to lease land or engage in more precarious sharecropping agreements, as in the Ghanaian cocoa sector. However, in other contexts such as Malawi, migrant entrepreneurs have come to dominate informal export markets and acquire the resources to invest in technological innovations. The relationship between ethnicity and land is not necessarily a given and may change over time. In Nigeria, the shift from communal land tenure to private property relations has in turn altered the conditions for migrant labourers, to one of short-term contracts. At the same time, ethnicity has been politically important in terms of connections to powerful state actors and it is now possible for some migrant farmers to go on to purchase land.

In Zimbabwe, the land reforms of FTLRP 2000 made ethnicity and citizenship the defining axis of social differentiation, formally classifying farmers into three groups (A1, A2, and CA farmers). Following the displacement of white settler farmers, A2 farmers accumulate from above through patronage and access to inputs and labour support, while A1 farmers accumulate from below through reinvestment of sale proceeds. Therefore, while land relations are the most important long-term process through which agrarian social differentiation occurs, it is not necessarily taken for granted that larger landowners will be better able to survive a shock. Their larger resource endowment, particularly in terms of financial capital, means that they can bear a disruption in trading caused by a shock such as COVID-19. Yet, the relation between land and the ability to withstand a shock depends on the nature of the shock itself: the same patterns will not hold if the shock concerned the land itself, such as the redistribution of land in Zimbabwe.

In order to understand the differentiation resulting from commercialisation, attention must be paid to the political processes structuring systems of access to market, land, labour and inputs. These often involve political settlements between elites. However, it is equally important to understand the negotiations of individuals which often inform their resilience within these structures. Analyses limited to the macro-perspective of the political settlements approach can fail to account for the negotiations of non-elite but important actors such as female traders, or the *makoronyera* of Zimbabwe, who have an important role to play. Consideration of the domestic sphere, or non-rational market logics, help analysts understand how outcomes may be reshaped for individuals in any given settlement. This attention to non-elites may be especially important when understanding how women are engaged or marginalised through different structures and processes (O'Rourke 2017). With particular attention to land, Peters (2004) has warned against placing too much emphasis on agential tactics, and for attention to be maintained to how state level processes of resource access contribute to class formation. The point is not to focus on one level of interaction, but to understand how local level and interpersonal negotiations take place within general, politically organised structures which confer advantage on given groups.

The effects of the COVID-19 pandemic have overlaid patterns of social differentiation that shape access to resources, markets, and other opportunities for those involved in commercial agriculture. These longer-term patterns interact with people's abilities and capacities to deal with shocks such as COVID-19. Findings from the value chain studies discussed in this paper, show that larger businesses had greater resilience capacities to deal with the immediate effects of COVID-19 on access to markets and labour. This is because they have been advantaged over the longer term by processes of land distribution and sometimes by support in accessing markets, to the extent that they have accumulated the capital to be able to respond to a slowdown in trade and unfavourable prices. Larger or more successful businesses with access to a reasonable amount of liquid capital, rather than only land or plant holding, could use it to stockpile goods, buy up cheap goods, pay higher transport costs and storage charges, or just withstand a period of no trading. Pre-existing patterns of social differentiation mean that those who are more able to deal with brief shocks are more likely to be men, indigene farmers, and those who are already older or wealthier. Those who have larger businesses for other reasons are also included.

The way gender, ethnicity and migrancy as facets of identity interact with processes of social differentiation in the face of shocks depends on the nature of the shock and the nature of a group or individual's resource access capability. Women, migrants, and the poor, as intersecting social groups who are more likely to be labourers than landowners, continue to be, overall, structurally disadvantaged by land tenure systems and political settlements that have shaped the agrarian sector over the long term. The result is that as women are more likely to be small-scale business owners and have smaller capital reserves and other resilience capacities to withstand the effects of shocks like COVID-19 or turn them to their advantage. Smaller businesses are also less likely to be able to access temporary business relief packages such as loans. However, women and migrants who are successful traders or large-account farmers are less likely to suffer these effects and will have resilience capacities that are comparable to the more advantaged groups described above.

In the first year of the pandemic, COVID-19 itself had the type of short-term effects that result from short-term market changes such as price changes, export bans, or input provision shocks. Early data did not show that COVID-19 had caused changes that could have a longer-term impact on agrarian relations, such as distress land sales or permanent migration. However, these types of eventualities could become possible as COVID-19 becomes endemic, and unequal access to vaccines globally reinforce structural inequalities in the rate at which different countries are able to recover from the pandemic. It would then become more of a stress than a shock. For the time being, COVID-19 is more of a shock that accentuates existing longer-term patterns of social differentiation. In the medium to long term, the effects of COVID-19 are less predictable. Flows of aid are being affected as some developed countries, including the United Kingdom, which have racked up huge debts from dealing with crises at home, seek to reduce their aid budgets. Simultaneously some debt repayments, for example to the IMF, have been paused. These policies, which are also driven by political settlements, confer relative advantage on different groups and will continue to contribute to patterns and structures that shape social differentiation.

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